

JAMES MORGAN

EDUCATION

College of Charleston
Bachelor of Science
Major: Communications
May 2013

WORK EXPERIENCE

CITIGROUP

February 2021-Present

Position: Licensed Service Analyst

- Place security trades for clients
- Assist clients with retirement account
- Process bank and financial transfers

Certifications:

- Series 7 & Series 63

FIDELITY INVESTMENTS

January 2016 - September 2019

Positions: Financial Representative Full-Trader &
Electronic Response Representative

- Personally write emails tailored to specific clients
- Utilize a style guide for consistency in written communication
- Assist clients with brokerage accounts, investment portfolios, & managing Individual Retirement Accounts (IRA)
- Assist clients with 5498 & 1099 tax forms
- Handle confidential information

HORSESHOE CASINO

June 2015 - December 2015

Position: Valet Attendant

- Serve clients in a fast-paced environment
- Manage productivity spreadsheets
- Securely handle clients' personal property

YOUNGLIFE / FIRST PRESBYTERIAN MONROE

June 2014 - April 2015

Position: Youth Director & Church Partner

- Lead youth group and college student group
 - Create content for high school students
 - Identify leaders, interview applicants & build teams of volunteer leaders
 - Budget & plan events
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CAREER OBJECTIVE

My career objective is to build a long-term career with a reputable company I can be proud to work for. I seek a balance of challenge in my career with a healthy work and life balance. I aim to continually learn new skill sets while mastering those I have previously learned. Finally, I desire opportunities for growth within the company I work for, and the chance to prove myself as a valuable member of my team.

PROGRAMS

- Microsoft Word
- Microsoft Excel
- Microsoft Powerpoint
- Google Docs
- Google Sheets
- Google Slides

VOLUNTEER EXPERIENCE

CROSSROADS CHURCH

Position: Men's Group Leader

- October 2016 - Present

Position: High School Ministry Leader

- March 2018 - Present

YOUNGLIFE: WEST ASHLEY

Position: Volunteer Team Leader

- January 2010 - June 2014

PERSONAL INTERESTS

- Playing recreational hockey
- Camping and hiking
- Board games

CONTACT

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